# Airgas Punchout User Guide

## 🌐Welcome: *Overview*

### Airgas Punchout User Guide

This document serves as your primary reference for navigating and utilizing the Airgas Punchout system within your eProcurement platform. It provides standardized, step-by-step instructions for essential functions, ensuring a streamlined procurement workflow.

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## 📖 What This Guide Covers:

**This guide is designed to assist you with the following core processes:**

- **Account Selection:** Identifying and **choosing** the correct **shipping** and **billing** profiles *(if applicable)*.
- **Product Search:** Utilizing **tools** to locate **specific items** or **browse** the **Airgas catalog**.
- **Order History:** Accessing and reviewing **previous** transactions for **tracking** or **reordering**.
- **Checkout Process:** Finalizing your **cart** and **successfully** transferring **data** back to your **procurement system.**

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## 🛠️ Need Support?

If you encounter **technical issues** or require **further assistance**, please Click HERE to **contact** our **support team**.

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## 🌱Getting started:

**Follow the steps below that align with your initial Punchout experience:**

1️⃣**Option 1:** If the Punchout system **opens** to a **Select Account** page, **begin** with 📍**Account:** *Selection*.

2️⃣**Option 2:** If the Punchout system **opens directly** to your **Account Dashboard**, please **begin** with 🏠**Home:** *Dashboard & Navigation*.

❗ ***Important Note:*** **Screens** and **options** you encounter may **vary** based on your **system's specific configuration**.

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## 📑Contents: *(Click a topic to be taken directly to that page)*

🌐Welcome: Overview 1
- 📖 What This Guide Covers: 1
- 🛠️ Need Support? 1
- 🌱Getting started: 1

📑Contents: (Click a topic to be taken directly to that page) 2
📍 Account: Selection 3
🏠Home: Dashboard & Navigation 4
- 🧭Navigation Bar: Direct Access to Account Tools 4
- 🖥️Dashboard: Scroll Down ⬇ 5
- 🏷️Cylinders: In Possession 6
- 🛍️ Puchases: Top Frequent 6
- 📋Lists: Recent, View & Create 7
- 📝Quotes: Recent 8
- 📂Quotes: To Open 8
- 💻Invoices: Recent Invoices & Proof of Delivery: 9
- 📦Recent Orders: Status, History & Reordering 10

🔍Product: Search & Express Order Pad 11
- ⚖️Option A: Search for Products 11
- ⚖️Option B: Express Order Pad 11

🦺Product: Product Display Page & Safety Data Sheets (SDS) 12
- Product: Display Page 12
- SDS: Safety Data Sheet 12

🛒Shopping Cart: Features & Checkout! 13
- Features: 13
- 💳 Checkout & Final Steps 13

🚀Pro-Tips: Ease of Use 14
📌 FAQ's: Troubleshooting 14
🛠️ Help: Still need Assistance? 14

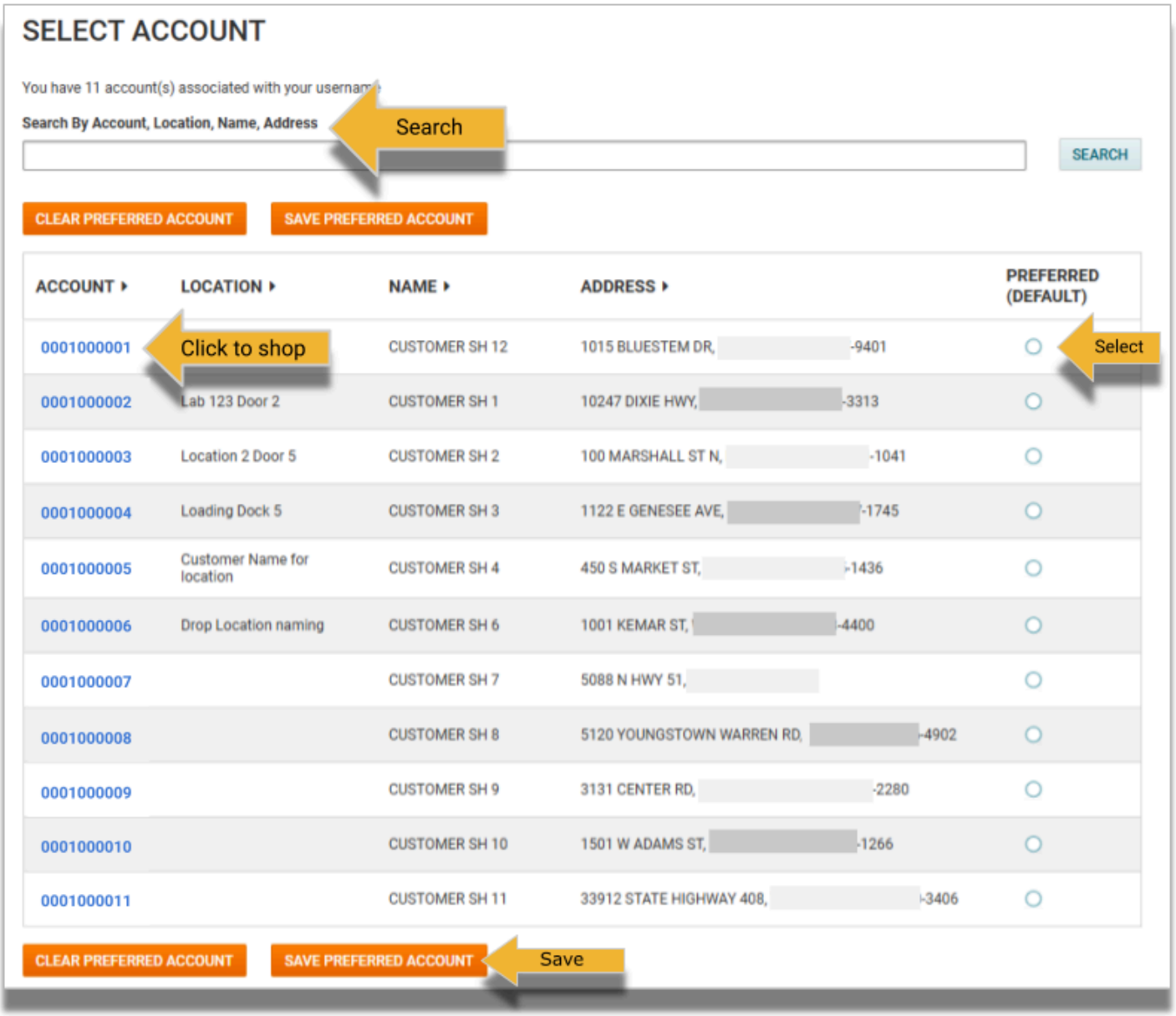
# 📍 **Account:** *Selection*

*Identify your shopping location. If you automatically land on your Account Dashboard skip this section*

1. **Find Account:** Use the **search** bar to search by **number, name, address or combination.**
2. **Start Shopping:** Click the **hyperlinked account number** to open your dashboard.

**💁Helpful notes:**

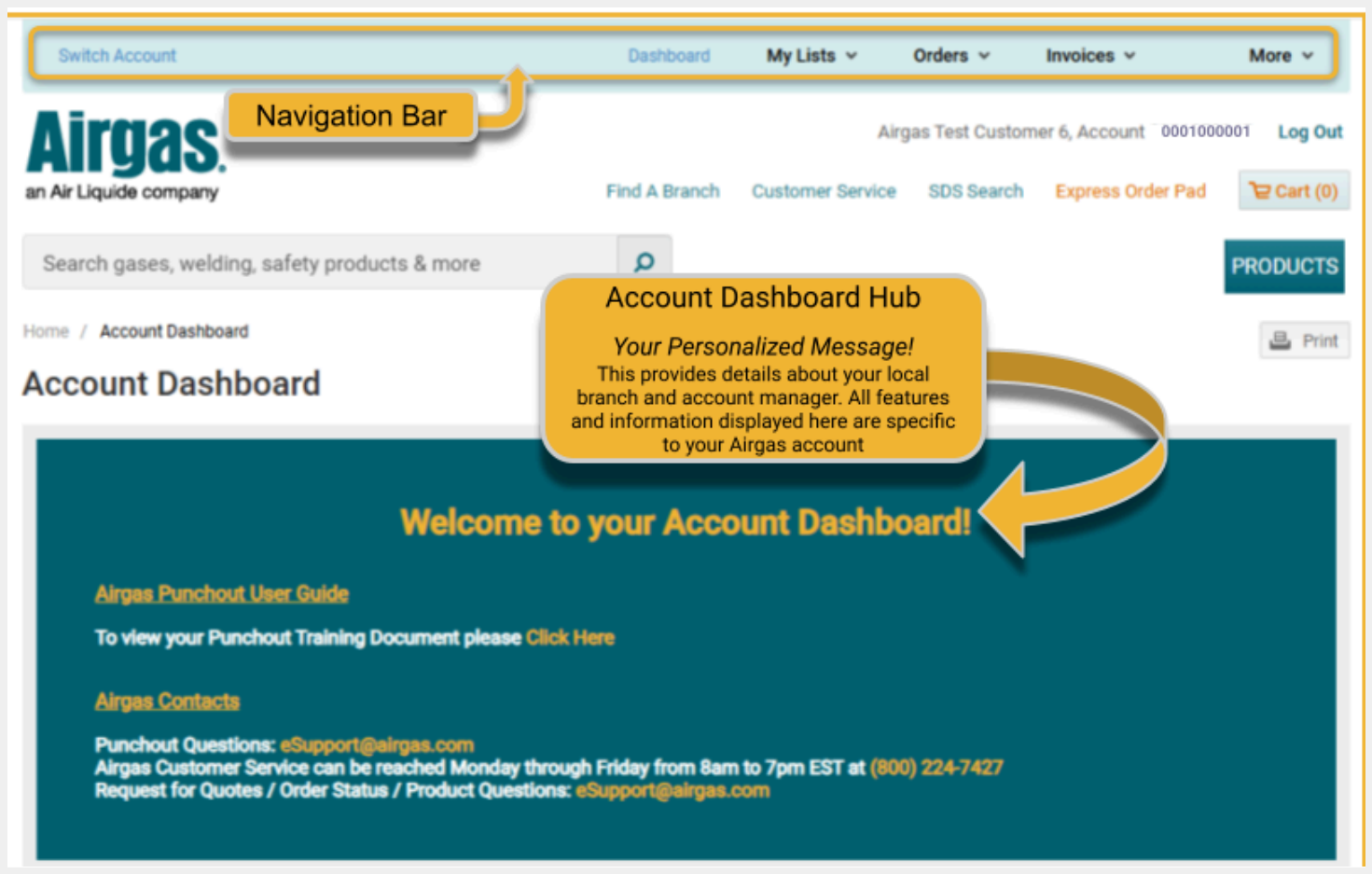
- **Save a Default Account:** To save time if you only purchase for a single location, you can set that location as your default account. Simply select the **radio button** next to your account and click **"Save Preferred Account"**. Next time you access the **punchout**, you will automatically land on your **Account Dashboard**.
- To change your default account later, use **Clear Preferred Account**.
  - **Note**: This setting is **cookie-based**. If your browser cookies are **cleared**, you will **need** to **select** the account **again**.
- If your **account number** does not **appear**, contact eSupport@airgas.com.



# 🏠 **Home:** *Dashboard & Navigation*

## 🧭 **Navigation Bar:** *Direct Access to Account Tools*

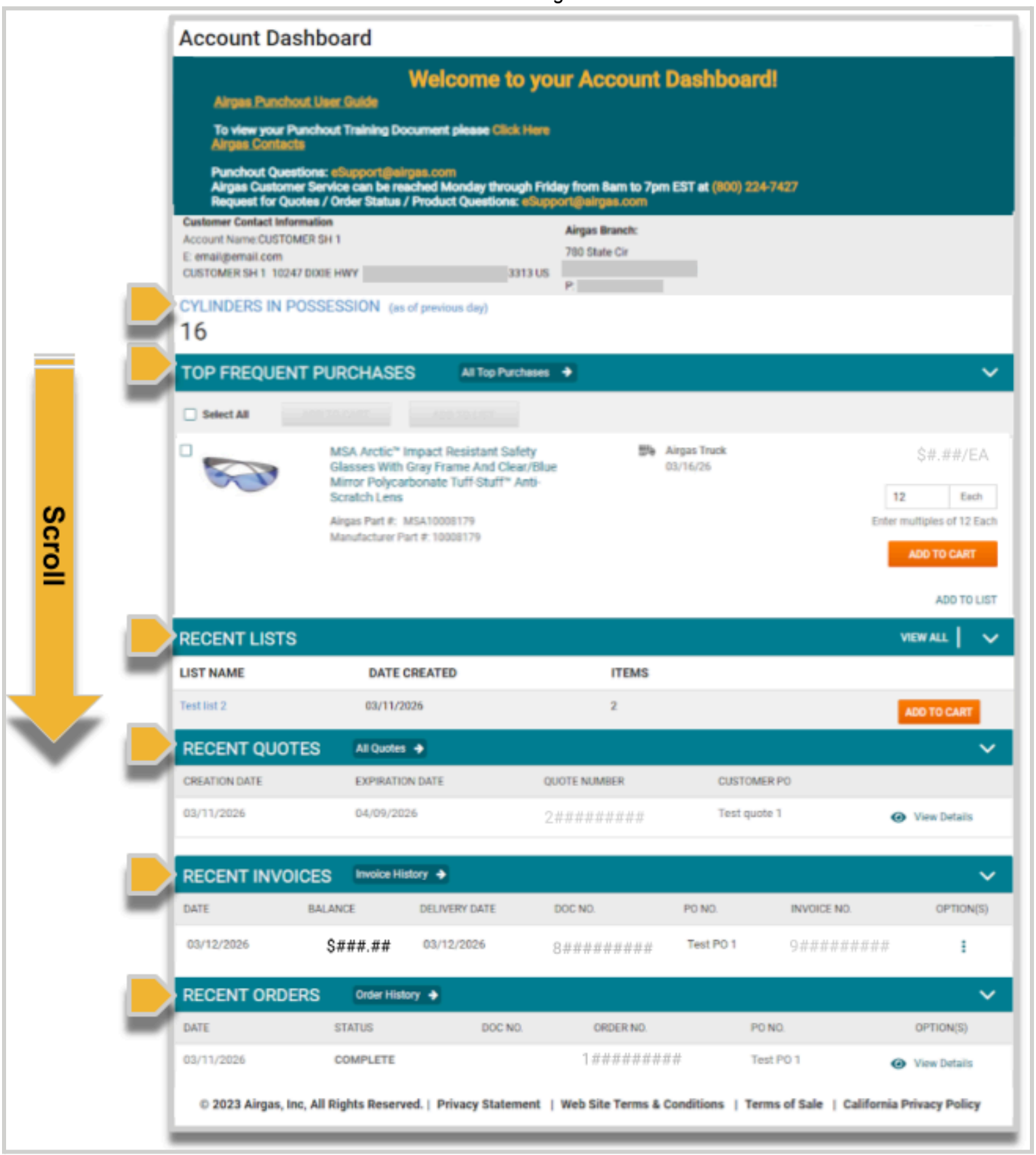
*Use the top navigation menu to access the most common Punchout features.*




- **Switch Account:**
  - Click here to **change locations** if you manage multiple sites, if **applicable**.
- **Dashboard:**
  - Return to the **Home Page** hub.
- **My Lists 🔻:**
  - **My Products:** Shows contracted items and sales-history items.
  - **View All My Lists:** Opens your saved shopping lists.
- **Orders 🔻:**
  - **Express Order Pad:** Enter part numbers and quantities for **fast reordering**.
  - **Frequently Purchased Items:** View items you regularly buy.
  - **Quotes**: View active quotes *(valid for 30 days)*. **Quotes** must **match** your current ***"Ship To"*** account.
  - **Order History**: Search a **12-month** archive of past orders.
- **Invoices 🔻:**
  - Select **"Invoice History"** to download PDFs *(if applicable)* or **Proof of Delivery** *(POD)* records
- **More 🔻:**
  - **Certificate of Analysis:** Opens a **Quality Assurance** document for **qualifying products**.
  - **Cylinder Balance:** Opens current **cylinder balance** details.
  - **SDS Sheets:** Opens the Safety Data Sheet library for gases.

## Dashboard: *Scroll Down*

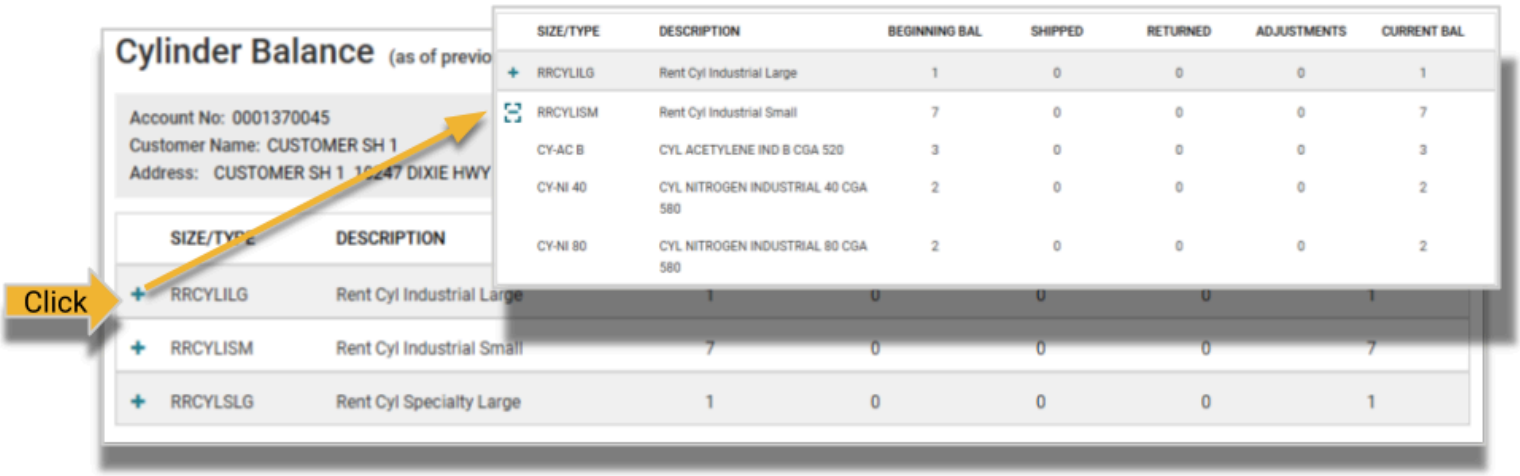
*Scroll down to see the next sections or access them via the navigation bar.*



## 🏷️ **Cylinders:** *In Possession*

*The dashboard provides a snapshot of your current cylinder balance, allowing you to track and manage your inventory.*

- Click **Cylinders in Possession** to open the **detailed** cylinder view.
- The detailed view can show **category, beginning balance, shipped, returned, adjustments,** and **current balance**.
- **Expand** a cylinder **category** to see **specific** material **types**.
- This **view** can help **identify** part numbers for **reorder** planning.




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## 🛍️ **Puchases:** *Top Frequent*

*This section **displays** items purchased over a **90-day period.***

- Select **All Top Purchases** to display up to **25 items**.
- Use this area for **quick reorder** activity.



## 📋 **Lists:** *Recent, View & Create*

*You can access lists in either of these ways:*

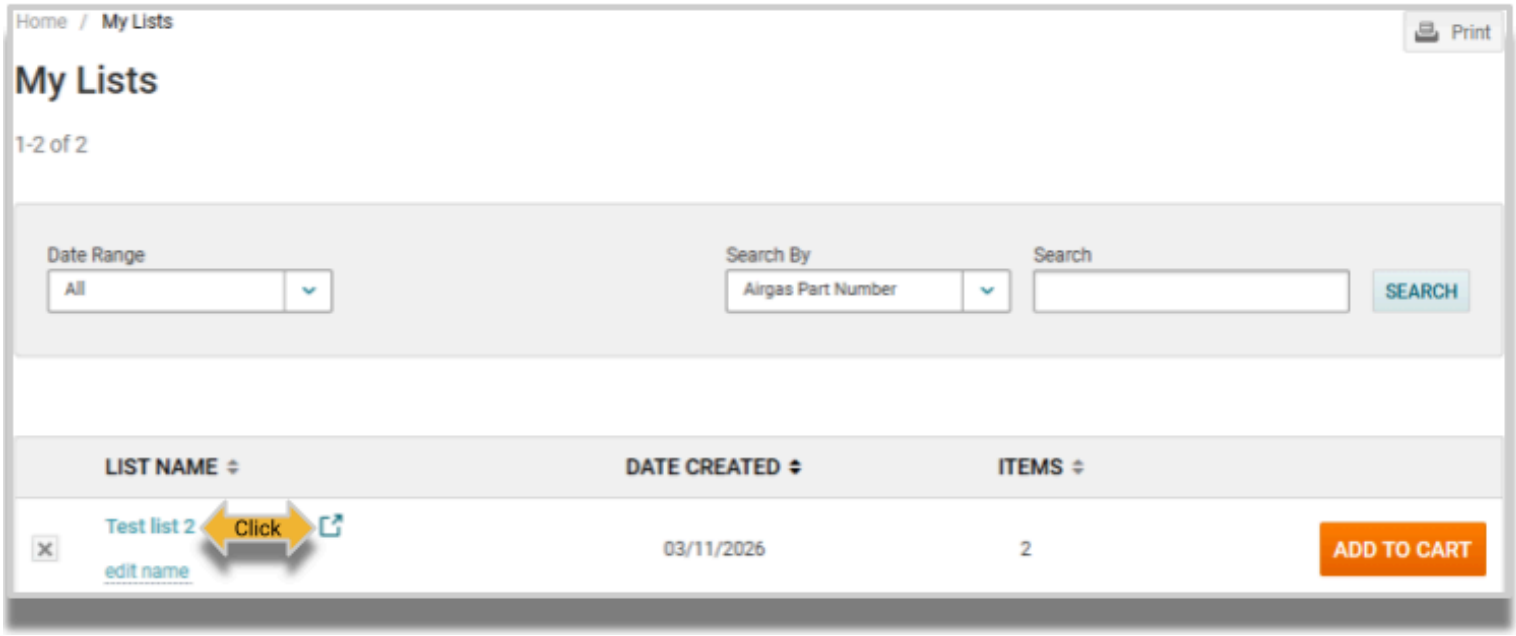
- **Select** View All from the Recent Lists section on the dashboard.
- Use **My Lists** from the top navigation.

*To view and create a list:*

- **Lists** act as a **reorder tool** for **commonly** purchased items.
- You can **create** multiple lists for **different** needs.
- **Lists** can be **edited** over time
- **Lists** are **viewable** by **all accounts**, use **descriptive** names to **differentiate** them.

### ❓ **What lists are useful for:**

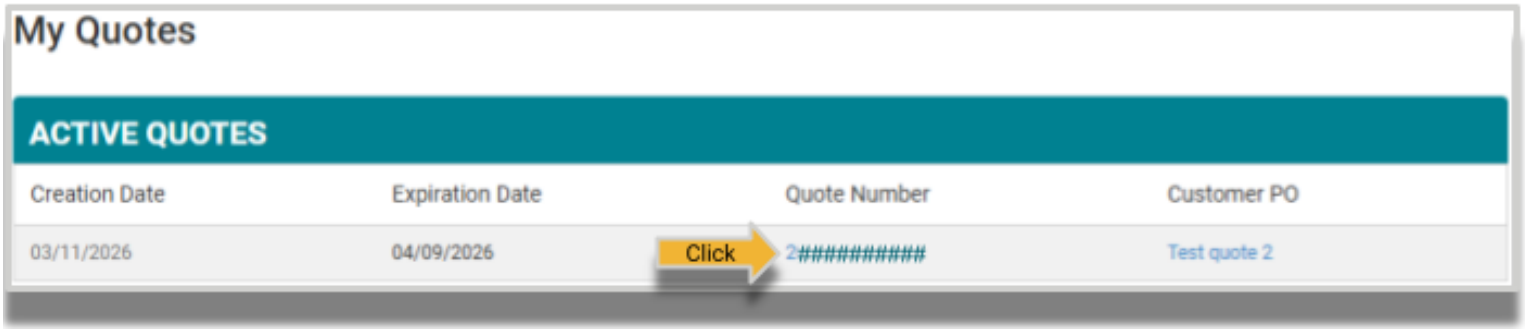
- **Grouping** products by **location**, **department**, or **use** case
- **Speeding** up repeat **purchases**
- **Reducing** manual searching for **common** items



## 📝 **Quotes:** *Recent*

*This section shows recent quotes for the account you are currently shopping on.*

- If an expected quote is missing, select All Quotes.
- Quotes can have different expiration dates.
- If the quote still does not appear, contact your local branch or account manager.




## 📂 **Quotes:** *To Open*

1. Go to **Quotes**.
2. Select the **Quote Number** hyperlink.
3. Review the **Quote Order Detail** page.
4. Add the quoted items to your **Shopping Cart** or a **List**.

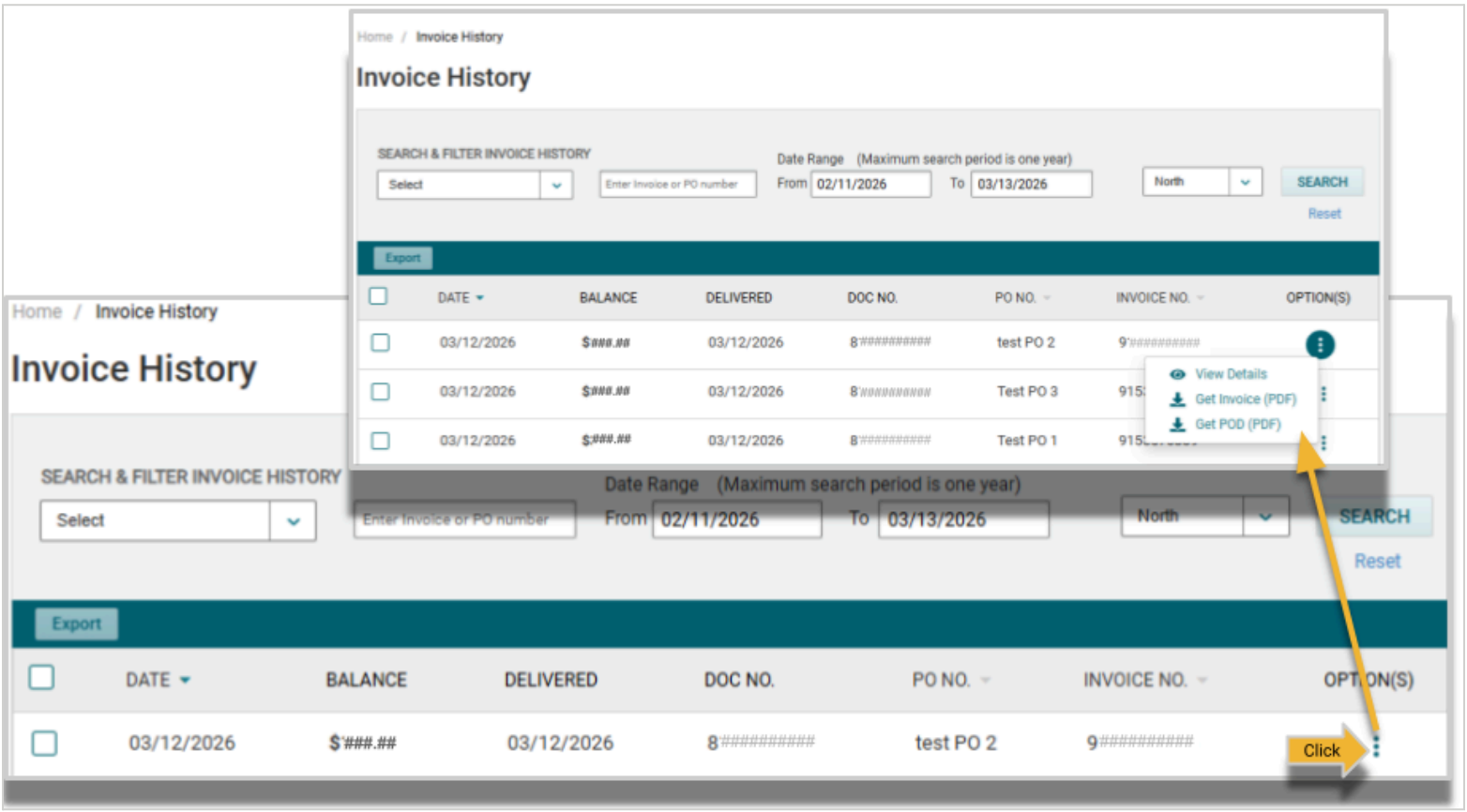
🚨 **Troubleshooting:** If your quote is missing

- **Quotes** must be tied to the same **ship-to account** you are **shopping on**.
- **Confirm** you are **shopping** on the **correct account**.
- **Contact** your **local branch** or the **Airgas representative** who **created the quote**.
- **Contact** eSupport@airgas.com if you need additional help.

## 💻**Invoices:** *Recent Invoices & Proof of Delivery:*

*This section shows recent invoices.*

- Utilize the **kabob menu** *(three vertical dots)* to:
  - **View Details:** Review comprehensive information and line-item specifics for your order.
  - **Get Invoice *(PDF)*:** Access and download a digital PDF copy of the transaction invoice.
    - ***Note:*** Please be aware that most electronic invoices are not configured to generate a PDF version.
  - **Get POD (PDF):** Download a PDF copy of the Proof of Delivery (POD) record for your shipment.



## 📦 Recent Orders: *Status, History & Reordering*

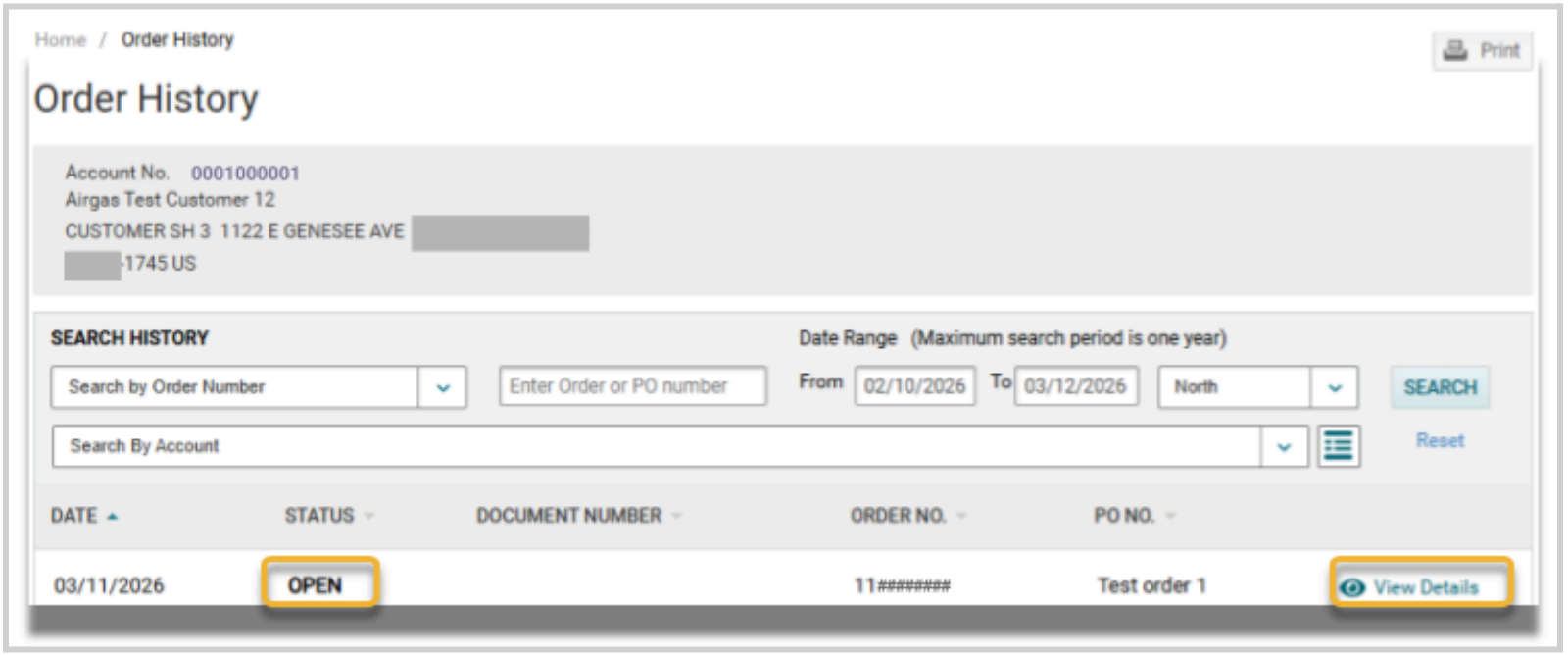
1. Order **status** may display as **Open** or **Complete**.
2. Use **Order History** to search **older** orders and access order **details.**

**On the Order Detail page, you can:**

1. Review quantities ordered and shipped
2. Review shipping method
3. Reorder products from a previous order
4. Add products from the order to a list

**To reorder all items from a past order:**

1. Open the **Order Detail page**.
2. Click **Select All** above the first product **checkbox**.
3. Confirm all **desired** products are **selected**.
4. Add selected items to cart.



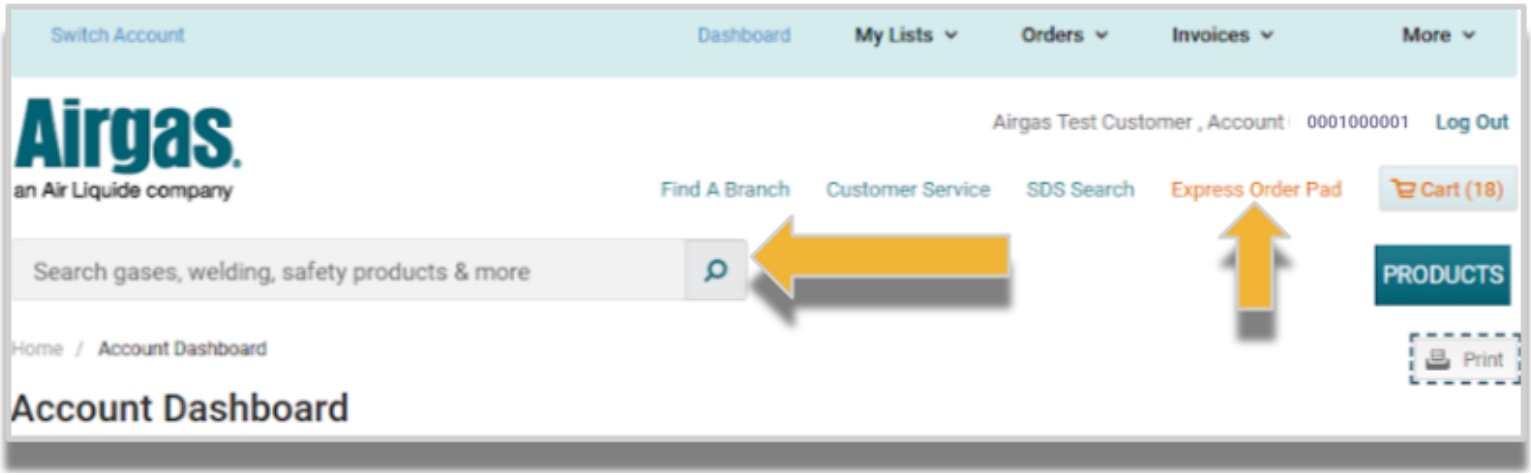
# 🔍**Product:** *Search & Express Order Pad*

*Punchout provides two primary ways to find and reorder products.*

## ⚖️**Option A:** *Search for Products*

*Use this option when you need to browse or confirm product details.*

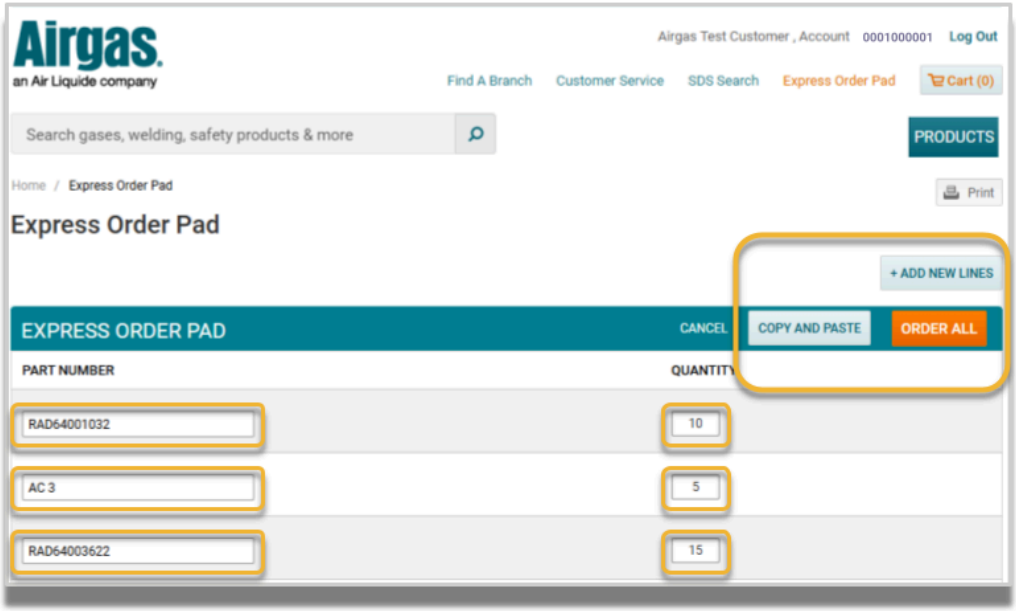
1. Click in the **Search Bar**.
2. Type the product name, keyword, or manufacturer
3. Select a suggested result as it appears, or continue typing. Click the search icon or press **Enter**.
4. Use **Narrow Results** on the left side of the page to refine results.




## ⚖️**Option B:** *Express Order Pad*

*Use this for quick reordering when you know the Airgas part number.*

1. Open the **Express Order Pad** from the **Orders** menu.
2. Enter the **exact** Airgas **part number** and quantity.
3. **Repeat** this for any additional **products** you need to order.
4. Click **Order All** to send all items to your cart.




### **Importing:** *Existing List*

Must **Copy & Paste** in the following format; ***"part number,quantity"*** **.**

***Example:***

RAD64001032,10
AC 3,5
RAD64003622,15

❗ *Important note:* **Part numbers** must be entered **exactly** *(including any spaces)*.

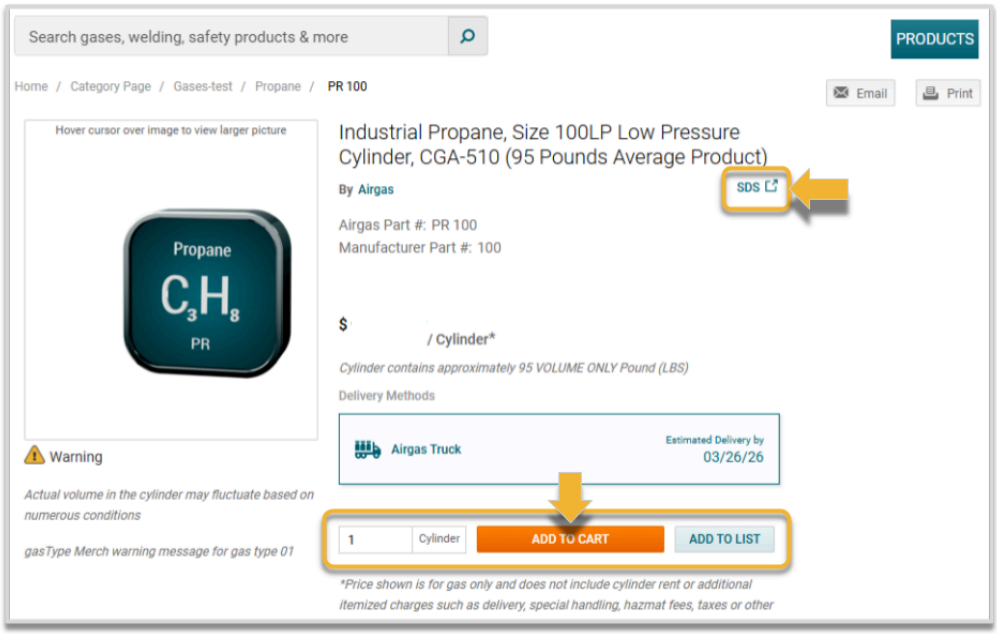
# **Product:** *Product Display Page & Safety Data Sheets (SDS)*

## **Product:** Display Page

*The Product Display Page provides detailed product information for individual items.*

On the **Product Display Page**, you can:

1. Review product specifications
2. Open the **Safety Data Sheet *(SDS)*** for qualifying gas products
3. Review delivery method and estimated delivery date
4. Update quantity
5. Add the item to your cart
6. Add the item to a list




## **SDS:** Safety Data Sheet

*Search for safety documentation using criteria such as the chemical name, product title, or SDS ID.*

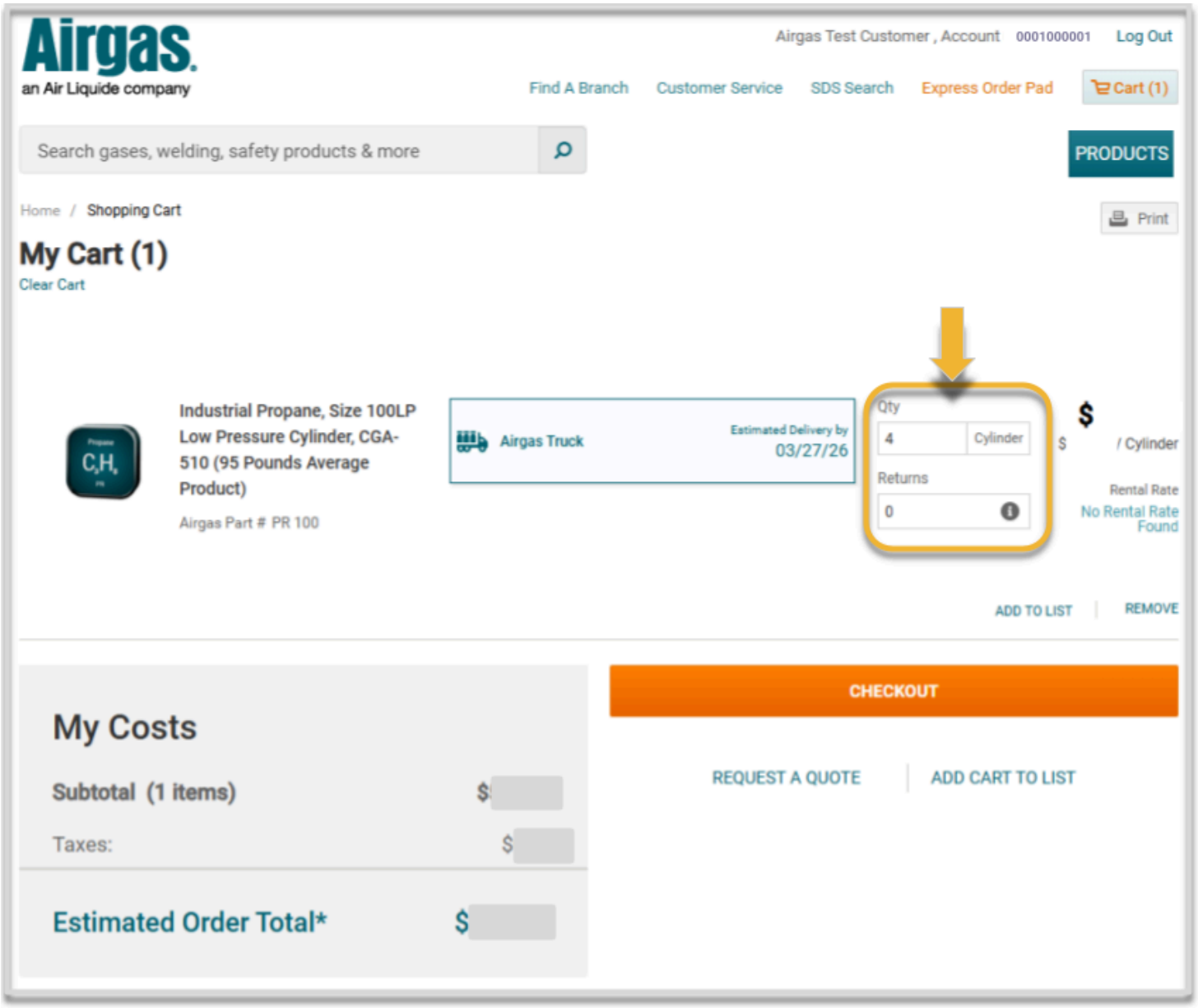



***Important Note:*** To view the **SDS** in a new tab, please ensure your browser's **pop-up blockers** are disabled.

# 🛒 Shopping Cart: *Features & Checkout!*

## Features:

- **Update Quantities:** Edit the **QTY** field and click anywhere on the page to refresh and apply changes.
- **Returns *(If applicable)*:** Enter the number of empty cylinders for pickup in the **Returns** box. You may purchase and return items in the same transaction.
- **Fees:** Subtotals include real-time pricing plus applicable delivery or fuel fees.




## 💳 Checkout & Final Steps

1. **Verify Details:** Before **proceeding**, ensure **all** addresses and location **details** reflect the correct delivery drop point.
2. **Submit Cart:** Select **Checkout** to transfer your items back to your **platform** and **create** a **requisition**.
3. **Delivery Notes:** After **checking** out, add specific **delivery instructions** within your platform's **"Notes to Supplier"** section.

## 🚀 **Pro-Tips:** *Ease of Use*

**How do I quickly find products or reorder?**

- ***Search Bar:*** *Best for browsing the catalog or confirming specific product specifications.*
- ***Express Order Pad:*** *The fastest way to reorder if you already have Airgas part numbers from a previous packing slip or invoice.*

**What is the best way to name my saved lists?**

- *Use descriptive, searchable names to help your team identify them. Examples include* ***"Lab B - Monthly Safety PPE"*** *or* ***"Dock 4 - Welding Consumables."***

**How do I navigate between pages or update my cart?**

- ***Navigation:*** *Use your browser's standard* ***"Back"*** *button to return to previous screens.*
- ***Cart Totals:*** *To update quantities, change the number and click anywhere in the* ***white space*** *on the page to automatically refresh all totals.*

**Where do I add specific delivery instructions?**

- *Enter notes like "Deliver to Dock C" in your internal platform's* ***"Notes to Supplier"*** *field during the final checkout process.*

## 📌 **FAQ's**: *Troubleshooting*

**Why can't I see my account number?**

- *If your account number is missing from the selection list, please contact* ***eSupport@airgas.com*** *for assistance.*

**Why isn't my Quote showing up?**

- *Quotes are account-specific. Ensure you have selected the exact* ***Ship To*** *account used to create the quote.* ***Note:*** *Most quotes expire after 30 days.*

**Why won't the SDS sheet open?**

- *Check your browser's* ***pop-up blocker****. It must be disabled for the Airgas site to allow the Safety Data Sheet to open in a new tab.*

**Why don't I see the Cylinder Return box in my cart?**

- *This is an optional feature. If it is not visible, your internal procurement team has not requested this specific setup for your account.*

**Why did my "Preferred Account" disappear?**

- *This setting is stored in your* ***browser cookies****. If you clear your cookies or switch to a different browser, you will need to re-select and save your preferred account.*

## 🛠️ **Help:** *Still need Assistance?*

| Issue Type | Contact Information |
|---|---|
| **Punchout and Order Integration Questions/Issues** | eSupport@airgas.com |
| **eInvoice Questions/Issues** | usairgas-digitaldataexchange@airgas.com |
| **Purchase Order (PO) Status Questions/Issues** | Contact your local Branch or Account Manager. |